



**SCHOOL NUTRITION
PROGRAM
ADMINISTRATIVE REVIEW
OFFSITE ASSESSMENT
TOOL
MODULE: MEAL COUNTING
AND CLAIMING**

Questions 300 - 311

Welcome to the SD Child and Adult Nutrition Services webinar.
The following training will provide a brief overview for the 300-series of the
Administrative Review, also known as the Meal Counting and Claiming Module.

MEAL COUNTING AND CLAIMING

- These questions talk about how you count, consolidate, and claim student meals for reimbursement.
- Work with your meal count staff to complete this section.
- Some questions will refer to the iCAN School Nutrition Program Application

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To complete this section, you will need to Work with your meal count staff.
Some questions will refer to the iCAN School Nutrition Program Application

MEAL COUNTING AND CLAIMING

- Be sure to include all the **different locations** where reimbursable meals are served and all the **different types of point of sale (POS)** meal count methods you may have in your district/agency



- Example: breakfast in classroom, in school suspension, head start classroom service, etc.

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Be sure to include all the **different locations** where reimbursable meals are served and all the **different types of point of sale (POS)** meal count methods you may have in your district/agency

Example: breakfast in classroom, in school suspension, head start classroom service, etc.

MEAL COUNTING & CLAIMING QUEST: 300

- Does the SFA use an electronic or manual system to consolidate reimbursable meals? If a combination of electronic and manual is used check both boxes.

- *Electronic = Meal counts get automatically consolidated in a computer system*
 - *An electronic system has virtually no manual data entry at the POS*

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Starting with Question 300: Does the SFA use an electronic or manual system to consolidate reimbursable meals? If a combination of electronic and manual is used check both boxes.

For definitions, an Electronic system means that Meal counts get automatically consolidated in a computer system. An electronic system has virtually no manual data entry at the POS

MEAL COUNTING & CLAIMING QUEST: 300 *CONTINUED*

- *Manual = Meal counts get taken manually, or must be consolidated (added together) manually for the monthly claim*
- *Manual & Electronic = Meal counts get taken electronically, but must be consolidated (added together) manually*

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A Manual system means that Meal counts get taken manually, or must be consolidated and added together manually for the monthly claim

A combination system of both Manual & Electronic is when Meal counts get taken electronically, but must be consolidated (added together) manually

The Question again is: Does the school use an electronic or manual method for consolidating meal counts? To answer, just check the box or boxes that reflect what system you are using.

MEAL COUNTING & CLAIMING QUEST: 301

- How does the SFA's point of service system identify a student's eligibility? Include all types of distinct counting and methods (e.g., check-off list for grades 1-3, tickets for grades 4-8).

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Next is Question 301 which asks: How does the SFA's point of service system identify a student's eligibility? Include all types of distinct counting and methods (e.g., check-off list for grades 1-3, tickets for grades 4-8).

MEAL COUNTING & CLAIMING QUEST: 301 CONTINUED

- *Describe how meal counts are taken at the point of sale? Where in the process is student eligibility added?*
- iCAN Application > Checklist Items > Meal Count Method > Question #12

Action	Checklist Item
View Modify	Audit Requirements
View Modify	Meal Count Method

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To answer this question you are to Describe how meal counts are taken at the point of sale and where the student eligibility is added or applied to the count

Depending on which system you are using, here are some things to consider:

If you are using an electronic system, is the student eligibility already housed within the system and automatically applied?

If you have a manual method, what work is done to add the student eligibility to the counts afterward, while also maintaining overt identification?

This question corresponds to question 12 in the iCAN Application. It is found under checklist items in the Meal Count Method attachment.

MEAL COUNTING & CLAIMING QUEST: 302

- Does the SFA have a backup system to their primary meal counting and claiming system should the primary system fail/not operate? If YES, describe the backup system in the comments
 - *Describe the process your district/agency has in place when your main meal counting/claiming process were to fail or not work properly?*
 - *This question applies to both electronic and manual benefit issuance methods*

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Question 302 says: Does the SFA have a backup system or process should the primary method not operate?

If you do have a backup system, describe that process in the comments section.

Here are some things to consider:

- If the school has an electronic process that fails just before lunch service, what process will be used to take counts?
- If you have a manual process but the typical Point of Service person is gone sick, what process is used to take counts?

MEAL COUNTING & CLAIMING QUEST: 303

- How often are cashiers and substitute cashiers trained on the meal counting and claiming system (including the backup system)?
- Briefly describe how often your cashiers and back up substitute cashiers are trained on your meal counting and claiming system.

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303: How often are cashiers and substitute cashiers trained on the meal counting and claiming system (including the backup system)?

For this, Briefly describe how often your cashiers and back up substitute cashiers are trained on your meal counting and claiming system.

MEAL COUNTING & CLAIMING QUEST: 303 *CONTINUED*

- Include how often they are all trained on your **back up** meal counting & claiming system.
- iCAN Application > Checklist Items > Meal Count Method > Question #2

Action	Checklist Item
View Modify	Audit Requirements
View Modify	Meal Count Method

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Also in your answer, Include how often they are all trained on your **back up** meal counting & claiming system.

This question corresponds to question 2 in the iCAN Application. It is found under checklist items in the Meal Count Method Attachment.

MEAL COUNTING & CLAIMING QUEST: 304

- At the end of each meal service, how does the SFA obtain the daily meal counts by eligibility category from each school's point(s) of service?
 - *Describe how daily meal counts are reported to the SFA.*

 - *Examples: All schools a part of one seamless electronic system, each kitchen manager completes the daily meal count form and delivers to the office, they faxed/emailed to the office daily, etc.*

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Now we are on Question 304 which says: At the end of each meal service, how does the SFA obtain the daily meal counts by eligibility category from each school's point(s) of service?

Describe how daily meal counts are reported to the SFA.

Some Examples of this include: A seamless electronic system that All schools are a part of, each kitchen manager completes the daily meal count form and delivers to the office, the meal counts are faxed/emailed to the office daily, etc.

MEAL COUNTING & CLAIMING QUEST: 305a

- What are the SFA's **meal counting and claiming policies and procedures**:
- **Offer versus Serve?**
 - *Describe your offer versus serve procedures for breakfast and lunch. Indicate what needs to be selected, at minimum, for a reimbursable meal under Offer Versus Serve.*

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305 Part A: What are the SFA's **meal counting and claiming policies and procedures for Offer versus Serve?**

Please Describe your offer versus serve procedures for breakfast and lunch. Indicate what needs to be selected, at minimum, for a reimbursable meal under Offer Versus Serve.

MEAL COUNTING & CLAIMING QUEST: 305a *CONTINUED*

- *Be sure to include differences in your OVS program if you handle it differently at different grade groups (e.g., elementary, middle school, high school)*
- *Not applicable is acceptable if your district/school does not allow offer versus serve at breakfast or lunch*

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Remember to include differences in your OVS program if you handle it differently at different grade groups (e.g., elementary, middle school, high school)
It is acceptable to mark Not applicable for this question if your district/school does not allow offer versus serve at breakfast or lunch

MEAL COUNTING & CLAIMING QUEST: 305b

- What are the SFA's **meal counting and claiming policies and procedures**:
- **Incomplete or Non-reimbursable Meals**

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305 Part B asks: What are the SFA's **meal counting and claiming policies and procedures for Incomplete or Non-reimbursable Meals?**

MEAL COUNTING & CLAIMING QUEST: 305b *CONTINUED*

- Describe your process for handling incomplete or meals that do not meet the requirements for a reimbursable meal.
- iCAN Application > Checklist Items > Meal Count Method > Question #5

Action	Checklist Item
View Modify	Audit Requirements
View Modify	Meal Count Method

- NA is not an acceptable response

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To answer this please Describe your process for handling incomplete or meals that **do not meet the requirements** for a reimbursable meal.
Not Applicable is **not** an acceptable response for this question

This question corresponds with Question 5 in the iCAN Application. It can be found in the Meal Count Method attachment under Checklist Items.

MEAL COUNTING & CLAIMING QUEST: 305c

- What are the SFA's **meal counting and claiming policies and procedures**:
- **Second Meals**
 - *Describe your process to handle second meals.*
 - *A second meal is a complete full tray for a student who has already had a reimbursable meal that day.*
 - *NA is an acceptable response if your district/agency does not allow students to take Second Meals*

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305 Part C asks: What are the SFA's **meal counting and claiming policies and procedures for Second Meals?**

To answer this, Describe your process to handle second meals.

A second meal is a complete full tray for a student who has already had a reimbursable meal that day.

You can answer Not Applicable for this question if your district/agency does not allow students to take Second Meals

MEAL COUNTING & CLAIMING QUEST: 305d

- What are the SFA's **meal counting and claiming policies and procedures**:

- **Visiting Student Meals**
 - *Describe your policy to handle visiting student meals.*

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305 Part D :What are the SFA's **meal counting and claiming policies and procedures for Visiting Student Meals?**

Please Describe your policy to handle visiting student meals.

MEAL COUNTING & CLAIMING QUEST: 305d *CONTINUED*

- *Include how are their meals handled and charged.*
- *Visiting students are students visiting your school, but are enrolled at another school.*
- *NA is an acceptable response if your district/agency does not allow students to visit, or if visitors are not allowed to eat*

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*Also in your answer, Include **how** their meals handled and charged.*

Visiting students are students visiting your school, but are enrolled at another school.

Not Applicable is an acceptable response if your district/agency does not allow students to visit, or if visitors are not allowed to eat

MEAL COUNTING & CLAIMING QUEST: 305e

- What are the SFA's **meal counting and claiming policies and procedures**:

- **Adult and Non-student Meals**
 - *Describe your policy on counting and claiming adult meals.*

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305 Part E asks: What are the SFA's **meal counting and claiming policies and procedures for Adult and Non-student Meals?**

*Describe your policy on counting and claiming **adult meals**.*

MEAL COUNTING & CLAIMING QUEST: 305e *CONTINUED*

- *Describe your policy on counting and claiming other visitors (non-students) meals?*
 - *Example: Visitors from the community, younger siblings that are not enrolled in your school, etc.*

- NA is an acceptable response only if no adults or non-student meals are offered

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*Also Describe your policy on counting and claiming **other visitors (non-students) meals?***

Visitors may be people from the community or a student's younger siblings that are not enrolled in your school, etc.

NA is an acceptable response only if no adults or non-student meals are offered

MEAL COUNTING & CLAIMING QUEST: 305f

- What are the SFA's **meal counting and claiming policies and procedures:**



- **Student Worker Meals**

- *Describe your policy on how student worker meals are counted and claimed. Are any students required to work for their meals?*
- *NA is an acceptable response if your district/school does not have a student worker program*

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305 F: What are the SFA's **meal counting and claiming policies and procedures for Student Worker Meals?**

For this, Describe your policy on how student worker meals are counted and claimed. Are any students required to work for their meals?

You are able to mark Not Applicable if your district/school does not have a student worker program

MEAL COUNTING & CLAIMING QUEST: 305g

- What are the SFA's **meal counting and claiming policies and procedures**:



- **A La Carte**

- *Describe your policy on a la carte meal counting and claiming.*
 - *A la carte foods are **purchased foods** that are sold extra, and not a part of the reimbursable meal.*

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305 Part G asks: What are the SFA's **meal counting and claiming policies and procedures for A La Carte items?**

Describe your policy on a la carte meal counting and claiming.

*Reminder that: A la carte foods are **purchased foods** that are sold extra, and not a part of the reimbursable meal.*

MEAL COUNTING & CLAIMING QUEST: 305g
CONTINUED

- *Describe your policy on offering free seconds, how are they included in the meal counting and claiming.*
- *NA is acceptable if there is no a la carte or free seconds offered at your district/agency*

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*Also in answering this question Describe your policy on offering free seconds, how are they included in the meal counting and claiming.
NA is an acceptable response here if there is no a la carte or free seconds offered at your district/agency*

MEAL COUNTING & CLAIMING QUEST: 305h

- What are the SFA's **meal counting and claiming policies and procedures**:

- **Field Trips**
 - *Describe your policy on field trips. Include how these meals are counted and claimed.*



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305 H asks: What are the SFA's **meal counting and claiming policies and procedures for Field Trips?**

Describe your policy on field trips. Include in the description how these meals are counted and claimed.

MEAL COUNTING & CLAIMING QUEST: 305h *CONTINUED*

- *Are they reimbursable meals? Be sure to include details to indicate that reimbursable meal requirements are met.*
- *If field trip meals are not reimbursable meals, Please indicate that they are not claimed, and explain how they are paid for.*

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If the field trip meals reimbursable meals, Be sure to include details to indicate that reimbursable meal requirements are met.

If field trip meals are not reimbursable meals, Please indicate that they are not claimed, and explain how they are paid for.

MEAL COUNTING & CLAIMING QUEST: 305i

- What are the SFA's **meal counting and claiming policies and procedures**:
- **Lost, Stolen, Misused, Forgotten or Destroyed Tickets, Tokens, IDs, and PINs**
 - *Describe your policy dealing with this item. Be sure to include: (when applicable)*
 - *Your process if a student forgets their PIN or doesn't have their ID that day*
 - *Replacement of these items*
 - *How the SFA ensure there is no misuse of PINs*

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305 Part I asks: What are the SFA's **meal counting and claiming policies and procedures for Lost, Stolen, Misused, Forgotten or Destroyed Tickets, Tokens, IDs, and PINs?**

Describe your policy dealing with this item. Be sure to include how you deal with the following situations:

What Your process if a student forgets their PIN or doesn't have their ID that day

How you go about the Replacement of these items

And How the SFA ensure there is no misuse of PINs

MEAL COUNTING & CLAIMING QUEST: 305j

- What are the SFA's meal counting and claiming policies and procedures:
- **Charged and/or Pre-billed/Prepaid Meals**
 - *Describe your process for these items. Be sure to include how your district/agency collects money.*
 - iCAN Application > Checklist Items > Meal Count Method > Question #13

Action	Checklist Item
View Modify	Audit Requirements
View Modify	Meal Count Method

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305 Part J: What are the SFA's meal counting and claiming policies and procedures **for Charged and/or Pre-billed/Prepaid Meals?**

Describe your process for these items and Be sure to include how your district/agency collects money.

This question corresponds to question 13 in the Meal count method attachment listed in the Checklist items of the iCAN Application

MEAL COUNTING & CLAIMING QUEST: 305k

- What are the SFA's meal counting and claiming policies and procedures:
- Students without funds to pay for meals



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305 K: What are the SFA's meal counting and claiming policies and procedures for Students without funds to pay for meals?

MEAL COUNTING & CLAIMING QUEST: 305k CONTINUED

- *Describe your policy when a student has a zero or negative balance. Include a statement of how students with money for the day's meal are handled.*
- Refer to iCAN Application > Checklist Items > Meal Count Method > Question #7

Action	Checklist Item
View Modify	Audit Requirements
View Modify	Meal Count Method

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For this, Describe your policy when a student has a zero or negative balance. Include a statement of how students with money for the day's meal are handled.
Refer to iCAN Application > Checklist Items > Meal Count Method > Question #7

MEAL COUNTING & CLAIMING QUEST: 305I

- What are the SFA's **meal counting and claiming policies and procedures**:

- **New students without approved certification of free or reduced-price benefits**
 - *Describe how your district/agency handles new student eligibility benefits and meals*

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305 Part L asks: What are the SFA's **meal counting and claiming policies and procedures for New students without approved certification of free or reduced-price benefits?**

Please Describe how your district/agency handles new student eligibility benefits and meals

MEAL COUNTING & CLAIMING QUEST: 305m

- What are the SFA's **Local Charge Policy and Unpaid Meal Policy Procedures**:
- **Provide a copy of the policy to CANS.**
 - *Describe how your district/agency charge policy.*
 - **NOTE:** Schools/agencies which charge for meals are required to have Local Charge Policy regarding how to handle unpaid fund balances, charging of meals, etc.

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Part M asks: What are the SFA's **Local Charge Policy and Unpaid Meal Policy Procedures**? **Provide a copy of the policy to CANS.**

Describe how your district/agency charge policy.

Please NOTE, Schools/agencies that charge for meals are required to have Local Charge Policy regarding how to handle unpaid fund balances, charging of meals, etc.

MEAL COUNTING & CLAIMING QUEST: 306

- What procedures are used as internal controls to ensure the meal counts do not exceed enrollment or attendance adjusted enrollment?
 - *Describe your process to check your daily meal counts are not more than your school enrollment or daily attendance adjusted enrollment.*
 - *Internal Controls are also known as Edit Checks*
 - *You can find more information about Edit Checks in CANS NSLP memo #211-1: [Edit Checks](#)*

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Now we are on to Question 306: What procedures are used as internal controls to ensure the meal counts do not exceed enrollment or attendance adjusted enrollment?

For this, Describe your process to check that your daily meal counts are not more than your school enrollment or daily attendance adjusted enrollment.

Note that Internal Controls are also known as Edit Checks

You can find more information about Edit Checks in CANS NSLP memo #211-1: [Edit Checks](#)

MEAL COUNTING & CLAIMING QUEST: 307

- **Electronic Systems Only** (*if question 300 is answered as an electronic system is used, answer this question*)
- Are meal counts automatically consolidated?
 - **Answer Yes or No**

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Question 307 is for Electronic Systems Only (*if question 300 is answered as an electronic system is used, answer this question*)

Are meal counts automatically consolidated?

This is a yes or no question

MEAL COUNTING & CLAIMING QUEST: 307 *CONTINUED*

- **If YES**, Describe if the software program contain edit checks and internal controls. Describe how those checks are compared against the daily meal counts.
- **If NO**, Describe if how you complete edit checks and internal controls. Describe how those checks are compared against the daily meal counts.
- *Internal Controls are also known as Edit Checks*
 - *You can find more information about Edit Checks in CANS NSLP memo #211-1: [Edit Checks](#)*

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If you answer YES, Describe if the software program contains edit checks and internal controls. Describe how those checks are compared against the daily meal counts.

If you answer NO, Describe if how you complete edit checks and internal controls. Describe how those checks are compared against the daily meal counts.

Reminder that Internal Controls are also known as Edit Checks and that you can find more information about Edit Checks in CANS NSLP memo #211-1: [Edit Checks](#)

MEAL COUNTING & CLAIMING QUEST: 308

- Have alternate points of service been approved by the SA?
 - **Answer Yes or No**

- If there are **alternate points of service**, describe in the comments the **number and types** of alternate points of service operating during each meal service (e.g., meals in classrooms, bus).

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308 asks if alternate points of service been approved by the SA? This is a yes or no question.

If there are **alternate points of service**, describe in the comments the **number and types** of alternate points of service operating during each meal service (example meals in classrooms or on the bus).

MEAL COUNTING & CLAIMING QUEST: 308

- Describe the number of alternate meal count points and location. Include a brief description of how the meal is served and counted.
- Alternate Point of Service means that the count is taken before the complete meal is served. Alternate POS must contain a check that students receive a complete meal.
- Refer to iCAN Application > Checklist Items > Meal Count Method > Question #2 and in the Site Application

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Describe the number of alternate meal count points and location. Include a brief description of how the meal is served and counted.

An Alternate Point of Service means that the count is taken before the complete meal is served. Note that Alternate Point of Service must contain a check to ensure that students receive a complete meal.

This questions corresponds to Question 2 of the iCan Application. It is found in the Meal Count Method Attachment under checklist items and it is also found in the Site application.

MEAL COUNTING & CLAIMING QUEST: 309

- If a school has more than one meal service line, how does the point of service system prevent duplicate or second meals from being claimed?
 - *Describe your process to ensure students do not receive more than one reimbursable meal. Include safeguards.*
 - *Example, one meal count check sheet in use, computer systems communicate with each other in real time, etc.*

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Question 309: If a school has more than one meal service line, how does the point of service system prevent duplicate or second meals from being claimed?

To answer this, please describe your process to ensure students do not receive more than one reimbursable meal. Include all safeguards used.

For example, one meal count check sheet in use and computer systems communicate with each other in real time, etc.

MEAL COUNTING & CLAIMING QUEST: 310

- At the site level, how are the total daily meal counts by category submitted to the SFA for consolidation?
 - *Explain the process used to get your daily meal counts from the school meal service location (generally in the cafeteria) to the office (or where the information is added together for the claim for reimbursement)*

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Question 310 says: At the site level, how are the total daily meal counts by category submitted to the SFA for consolidation?

Explain the process used to get your daily meal counts from the school meal service location (generally in the cafeteria) to the office (or where the information is added together for the claim for reimbursement)

MEAL COUNTING & CLAIMING QUEST: 310 *CONTINUED*

- *Example: faxed/emailed after each meal service, meal count checklist is taken to the office after each meal service, seamless computer system used so data transfer is instant, data must be pushed into the office computer terminal, etc.*

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Some examples for this include: faxed or emailed after each meal service, meal count checklist is taken to the office after each meal service, seamless computer system used so data transfer is instant, data must be pushed into the office computer terminal, etc.

MEAL COUNTING & CLAIMING QUEST: 311

- Describe the SFA's procedures for consolidating daily meal counts by category for each site to process the claim for reimbursement, if applicable.
- *Describe the how the main office processes the daily meal counts from each school/site by category (F/R/P) into the final monthly claim for reimbursement.*

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311: Describe the SFA's procedures for consolidating daily meal counts by category for each site to process the claim for reimbursement, if applicable.

For this, describe the how the main office processes the daily meal counts from each school/site by category (F/R/P) into the final monthly claim for reimbursement.

CONTACT US!

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1400 Independence Avenue, SW
Washington, D.C. 20250-9410;

(2) Fax: (202) 690-7442; or

(3) Email: program.intake@usda.gov.

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